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ABSTRACT

This paper presents examples from 10 internal consultancies provided by the author within the Open University (United Kingdom) that reveal how teams develop and are integrated into the systems of a complex institution. These consultancies included: providing consulting services to a course team; counseling with a course team chair; serving as a participant-observer with staff in summer schools; interviewing learners in summer schools; evaluating the impact of new technology on staff; conducting a workshop for staff on group dynamics; providing consulting services to the Centre for Mathematics Education team; analyzing group dynamics in a video about learning and teaching mathematics; confidential counseling of team members; and providing consulting services to a course team on child development. The paper concludes that consultancy for organizational learning depends on an awareness of the mental models in use. The consultancies enabled the consultants to realize that transitions to higher levels of integration--individual, team and institution--is a social expression of mental development. The impact of a distance environment on staff and learners is noted and the provision of some face to face contact is urged. An appendix is included. (Contains 16 references.) (Author/CK)

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Internal Consultancy, Team and Institutional Development

by Robert Nicodemus

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Internal consultancy, team and institutional development

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Abstract:

This paper was presented at Symposium 'Organization 2000: Psychoanalytic Perspectives', International Society for the Psychoanalytic Study of Organizations, New York City Marriott Financial Center, June 14 - 16, 1996

Examples from ten internal consultancies in the Open University reveal how teams develop and are integrated into the systems of a complex institution. Insights about learning and working at a distance contribute to ideas about the aims of staff development which enhance individual responsibility and creativity. Models of consultancy based on psychodynamic and systems theory offer two complementary approaches to the understanding and improvement of teamwork

Internal consultancy, team and institutional development

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Introduction

The Open University (OU) was established in 1969 to make higher education more accessible to learners at a distance. The numbers enroled for courses is now approaching 200,000 world-wide. Most of the 3500 full-time staff work in the centre in Milton Keyes (50 miles north of London) and about 15% are based in thirteen regional offices. Three times more part-time staff act as tutors who support and assess the learners. In addition to the creation of a complex multimedia system for course presentation, an important innovation are the teams of academics who produce the courses, often in partnership with the BBC. Because of the size and complexity of the OU, most staff work in teams. As one colleague wrote "while conventional academic work is essentially individualistic, in the OU it is collectivistic. Teams are fundamental to the work of the institution".

Through teamwork a sense of belonging to a unique community is created and between 1981-93 we documented some of these experiences. Our method was 'internal consultancy' (1) and it was sparked off by a study sponsored by the OU's Institute of Educational Technology (IET). The study was conducted by consultants from the Tavistock Institute of Human Relations (TIHR) (2). IET enquires into the success and difficulties of learners and conducts research into new technology for open learning.

Now seventeen years after the TIHR study, a new OU course has just been published which describes in detail the psychoanalytic theory that the consultants also drew upon (3). There are three clusters of concepts common to the major schools of psychoanalysis - (a) the source of irrational feelings revealed by the relationship with a therapist is also generated within families and groups. The requirements of the work task is in conflict with the needs of individuals and the emotional life of the group as a whole (b) Early experiences

lead to the formation of a lasting internal world, an emotionally charged construction of experience (c) Distortions of internal versions of the world serve to avoid anxiety. These processes, regularly seen in consultancy (4), lead to a view of institutions as poor models for learning (5).

Following the TIHR, in 1981 we adopted a psychodynamic approach (6) where the consultant may expect at times to suffer some of the experiences of team members and learners. The consultant's expertise is to manage the process, clarify and share thoughts and emotions, a view of learning also associated with the use of computers (7). The consultant may feel unable to learn, prone to making mistakes or being the focus of very mixed feelings sometimes as strong as love and hate. Describing such experiences in a team gives everyone a moment to reflect on the events and take responsibility, if appropriate, for changing them. Another colleague wrote "Self interest (elemental) inevitably means alliances form within groups at certain times and the strength of the Group as an entity, as well as the Chair, can keep these alliances in check ... 'testing out ideas about what is happening at the time' is the key for me". Still another wrote "It is very interesting to read about consultancy in one's own organization. Some of your points about course team dynamics and summer school conflicts are fascinating".

Organization as community

Emotional commitment to work is essential for any educational endeavour and brief examples from ten consultancies in the OU (out of twenty-three listed in the appendix) reveal what is rarely written about. The ten consultancies may be organized into three stages, Beginning (81-83), Middle (86-89) and Ending (91-93) and each stage was associated with some questions, more implicit than explicit e.g.

How do individuals become committed to a team?
How are different tasks integrated within the institution?
What purpose does face to face contact or summer school serve?

As these questions were addressed through the first four (numbered) consultancies more realistic relationships gradually replaced idealized ones. Non-verbal communication was often more important in creating a sense of community. The idea of integration is used too readily where re-integration is closer to the truth. What becomes disintegrated when people have agreed tasks

rationally? The emotional life of the group has to be nurtured as well as the rational.

When hopes are too threatened by fears, a protective process is engaged where a 'negative' thought is split off and relocated somewhere else, into a team member or somewhere outside the team. Or a learner may idealize the OU, thinking the systems will not allow failure. Work or study are enabled when anxieties are not distractions. But the process is complex and rapidly changing. Re-integration is emotionally driven by beliefs in values beyond an isolated self in a material world. A symbol for integration at a higher level is a team which becomes more inclusive of tasks and members as reality replaces fantasies. In the testing out process of consultancy one must be prepared for the unexpected and irrational (8).

Ten consultancies

My first consultancy started twelve years after the OU was established. One worry was that we did not seem to be learning from our 'mistakes' and just repeated them over and over again in each new course team. This led to the first and only in depth study of a team over a year. Course teams are temporary grouping of academics and take about two years to produce a course. They may have 5 to 20 or more members.

1. Consultancy to a course team.

In 1981, because of my association with the TIHR project, the team chair asked for help with conflicts that might affect the quality of course materials. This was the first time I stepped out of my conventional IET role and agreed to be a consultant on group process, attending meetings and interrupting them when I thought it was important to reflect on what was happening . However well organized the chair was, he appeared at times to become invisible to the team, his attempts to manage ignored. He seemed to represent two quite different things, a protector of the team and manager of the boundary between it and outside or a representative of external persecutory anxieties i.e. unrealistic demands from management schedules and inadequate resources from the institution.

The chair functioned to contain emotions as fears were replaced by the experience of progress, tasks clarified and completed. But memory of progress was forgotten when anxieties about vulnerability and commitment led to conflict e.g. about academic versus teaching standards, withholding of information or commitment to the team. Members based outside the centre, in

regional offices, became a focus of anxieties about dependence. They were denigrated, scapegoated or treated as if they were really 'outside' the team, thus taking the negative feelings away. As these dynamic were re-enacted, team members became aware that some anxieties originated outside the team and were linked to potential criticisms of peers or failure of learners. Certain team members because of experience, location or personality were more vulnerable to acting out the anxieties on behalf of the team. Through verbal and non-verbal behaviour fantasies became more visible and tested out in the light of reality. At one important moment team members stopped talking and looked quietly at the centre of the table long enough to be a striking change in behaviour. I think they were in touch with the destructiveness of the dynamics and their reparative feelings led to more valuing of each other, less conflict and more trust, as well as releasing the creative energy so characteristic of the OU teaching system. (9)

2. Work counselling with a course team chair.

Most teams contain the anxieties about task within the team. However, when colleagues or groups outside become a focus for projected anxieties, how is this processes contained? In my consultancy with the chair of a team, the power of the projections was enough to reverse our roles. Instead of the chair, I became the one who needed help and actually had to seek supervision to reflect on my disorientation (10). Regardless of my mistakes over the year, according to what the chair told me, his team seemed to work more effectively and ended with a satisfactory product. We had begun with a role confusion, thinking that we might write a joint paper on the experience as colleagues. Our difficulties in managing time boundaries increased and deflected from the task of using our relationship to understand the processes. The use of a tape recorder further distanced us from the demanding emotional work. The fantasy seemed to be that knowledge was located in the machine which we could return to later for understanding but in the absence of the other. Direct interaction is the most reliable way to share and compare fantasies and mental models in use and makes interventions in team meetings a powerful means of learning. I have not written up a case study of this consultancy.

3. Participant-observer with staff in summer schools

The purpose of this consultancy was to explore with staff their experience of learning in summer schools. This new and unfamiliar role, which was earlier negotiated with managers over two months, combined with the large number of people and groups, led to some powerful polarizations. During the two weeks of

summer school I came into contact with seven different courses, nearly fifty staff and some of the 300 students.

Maintaining neutrality is an inherent difficulty in internal consultancy and it led to mistakes. After some difficult interactions with staff in one course I started to explain my task in a way which was defensive rather than using the uncomfortable experience for learning. Staff were split between those critical of my role and those who found it valid. My own capacity for thinking was briefly fragmented and re-integrated with the help of a dream about a 'split-brain' experiment on a cat (11). Anxieties focused on issues such as authority and responsibility or couples and gender. After summer school I joined up with a woman colleague to report on the consultancy to staff based in a regional office. Although she was also based in a region, as a couple we evidently represented such a threat that we were split apart, psychically, and she became an object of criticism and attack. The potential of our creativity, a new idea or learning, could not evidently be tolerated. The regional staff eventually fragmented as a group, disagreeing about the importance of academic versus personal counselling.

Summer schools are very brief events where all the worries of separate and different OU groups are brought together in one place to focus on a task mainly concerned with academic knowledge. It is a very dynamic situation in which the challenge for a few is simply to survive and discover new abilities.

4. Interviewing learners in summer schools

Insights into how students learn was opened up in a consultancy with a group of colleagues based in the regions who taped their interviews with students before, during and after summer school. I had to listen to the interviews before leading a discussion about them, a process which took a few months to complete. The interviews stirred up a lot of mixed personal feelings which we had to work through, probably like any learner at a distance. Anxieties of a few students and staff focused on aspects of personal identity - age, experience, gender, couples, children and generations. The link between emotions and sexuality on the tapes was very powerful, and expressed by the quality of talk, tone of voice, sequence of images and, especially, the silence of pauses or the lack of them. The support we had built up prior to this consultancy was important in enabling us to listen to the tapes in depth and reflect on why we were unable to pursue some issues in the interviews. For one student visual images in his fantasies about the OU became less vivid after the social experiences of summer school and he was able to organize study and personal relationships more effectively. For one tutor, the presence of a student 'couple'

(in their own relationship) was so provocative that it resulted in a temporary confusion of roles and responsibility.

A few learners have an opportunity to address their mixed feelings in summer schools as idealization alternate with denigration of the OU or staff or other students. Many students approach summer schools believing everyone is more able. Containment of emotions in this volatile situation may lead to considerable learning for staff and students, and is the reason I refer to everyone in summer schools as learners.

Review of consultancies 1 - 4

Structural and dynamic aspects of learning and development in these consultancies include boundaries between self and others and alternation between two 'positions' of disintegration and re-integration (of positive and negative feelings). The dynamics may become excessive, inhibited or lead to reversal of attitudes or dependency relationships. The reparative values required for re-integration of what has been split apart are also a source of creativity. And creativity spans aspects of personal identity and beliefs - age, experience, gender, couples, children, and generation - which also provide a focus for anxieties. The idea of new generations embodies the separation and differences experienced in growing up and acceptance of the fact that that some changes cannot be reversed. We cannot physically go back into childhood or know what is ultimately unknowable in the future. Psychically, regression back to early stages of thinking might be unbearable without whatever belief or faith it is that sustains the dynamics. Through the chaos of confused boundaries, disorienting dynamics and despair, just approaching what seems to be true may be the essence of being human.

In the remaining six consultancies we see variations on these themes as well as increasing acceptance of the values represented by a psychodynamic approach. When people become more 'open' to their inner realities and see how this differs from external, objective reality, the idea of 'open' education acquires considerably more depth.

5. Report on the impact of new technology on staff

By 1987 increasing awareness of the impact of the personal computer led to my enquiry into the impact of new technology on staff but I was unable to find a place to discuss and explore the findings. This was probably due to my own lack of political awareness combined with a philosophy which seems to be "If the

systems or technology work, don't try to fix them" because you might run into the kind of difficulties I encountered in the next consultancy.

6. Workshop for staff on group dynamics

I conducted a workshop on teamwork and group dynamics for academic and administrative staff. A workshop for both staff groups together had never previously been offered and there was some concern about what would happen. Staff groups polarized between two views about managing, the need for a practical approach or a willingness to explore the hidden dynamic process . Again I found the consultancy becoming an object to denigrate or idealize as experiences resonated with personal vulnerabilities. But I was also discovering a greater diversity of staff who believed that the dynamic process was important. They functioned as containers which may be important to holding the institution together emotionally, together with more rational approaches.

7. Consultancy to the Centre for Mathematics Education team

My role here developed into commenting on what team members said when they took on the responsibility to reflect on group process at the end of team meetings. I had hoped to see this, where responsibility for observing process would be shared by all team members and not dependent on someone from outside. This consultancy also opened the door to further work with two mathematics course teams.

8. Group dynamics in a video. EM 236 Learning and teaching mathematics.

The task here was to write up notes about group behaviour in a video of teachers and pupils studying mathematics. Because my notes revealed so much about the difficulties of learning mathematics, they were incorporated into the review text. The academic acceptance of a 'psychodynamic' perspective was a strong endorsement of this work. An edited version was published in an academic journal (12).

9. Work counselling with three team members

Further trust in the validity of consultancy led to work counselling over two years with three different members of one course team. The team was perhaps too critical or destructive to tolerate the risks of consultancy directly with them. This confidential work cannot be written up.

10. Consultancy to a course team. E209 Child Development

A final consultancy to a course team arose because of the difficulties old and new staff were experiencing working together. Could this represent an awareness of the limitations of time, that some of us are getting old and will eventually be replaced?

Could the idea of a new generation be symbolic of organizational learning, that in the transitions what is learned will be passed on and not lost? In teams we experience reversals, roles and relationships become unclear, partly to distance ourselves from too much worry, and dynamics become excessive or inhibited as fantasies are enacted and tested out.

Reflections on ending

In my first seven years with the OU (74-81) I worked with six course teams as an educational technologist and in many summer schools as a tutor. It was not until 1978 that I started offering seminars and workshops for OU staff, and the thirty-four conducted up through 1991 were all related to the consultancies which grew out of the TIHR project. Ten addtional seminars were offered outside. By 1992 my intuition was that consultancy work was coming to an end. Possibly the anxieties related to organizational development and the impact of new technology had been worked through or were being replaced by a new challenge. At that time I did not appreciate the significance of new technology research into communication between learners and their questions about emotions. This may offer another direction for consultancy in the future.

But by 1993 I needed to distance myself from the OU in order to reflect on the previous twelve years and begin to place all of the case studies into the context of a book (the manuscript is presently being discussed). So for two years (94-96) I took half time study leave and enroled on an MA course in therapeutic bodywork (13). This may seem a long way from distance education but it took me back to the roots of therapy and education and provided a place to re-confirm my own abilities.

Conclusions

Consultancy for organizational learning depends on an awareness of the mental models in use, exploring the dynamics and faith in alternative approaches for understanding (14). Authority may represent a disabling threat or a safe place to adhere to without judgement and this can obscure roles and relationships or boundaries between self and other, inside from outside. With

excessive dependence, the emotions which thoughts need for action are blunted or broken. Without containment, the links in a dynamic process become too loose or tight, events too fast or repetitive, inhibited or deprived of symbolic meaning. Until emotion and thought are brought together the idea of a team cannot develop, creativity is stunted and openness to what is not expected becomes a closed door. Testing out with others ideas about what is happening at the time is potentially the most powerful means of enquiry into the mental models in use.

With a focus on 'mistakes', 'tools' may be used to avoid or correct them (15). A psychodynamic approach uses mistakes as evidence for a learning process leading to new mental models. Staff may apply the insights to their own authority, ability to contain anxieties and reflect on their meaning within the institution and culture outside.

Through the consultancies we realized that the transitions to higher levels of integration - individual, team and institution - was a social expression of mental development. Instinctual impulses like greed or envy could interrupt learning but were also necessary for it. Denial of the negative aspects of oneself and others, leaves one in isolation and without the means to discover different realities of groups.

Internal consultancy is the group equivalent of individual psychoanalysis. Analysis is the diagnosis of inner truth. Consultancy is the discovery of outer reality though social behaviour articulated and 'published' in infinite ways, verbal and non-verbal behaviour, images and atmosphere, myth and dreams, dramas and narratives.

Through these case studies we have seen the impact of a distance teaching environment on staff and learners and understood more about development of people in teams in institutions. Distance working and learning has unlimited potential for the future but requires some face to face contact (16). Internal consultancy offers an important way to learn about and share our experiences. The materials listed in the notes below represent a resource for staff development and the writings of Bion (see note 8) offer a way to reflect on our experiences.

Notes:

1. C. Huffington & H. Brunning (Eds) (1994) Internal Consultancy in the Public Sector. Case studies. London: Karnac Books. A comprehensive list of questions for negotiating internal consultancy contracts is suggested.

2. I negotiated a contract with Dr. W. Gordon Lawrence, then at the Tavistock Institute of Human Relation, to conduct a pilot study of staff experiences of teamwork. Their report and further details about the subseqent internal consultancies are available from two sources:

(a) Under my name in the ICDL on-line computer data base (International Centre for Distance Education, The Open University, Milton Keynes MK7 6AA, England) Internet: http://www.acacia.open.ac.uk/
Further information by E-mail: icdl-enquiries@open.ac.uk.
Information about the OU is also available from http://www.open.ac.uk/

(b) ERIC Reports (ED 346 798 - 346 804). Educational Resources Information Center, Clearninghouse on Higher Education,The George Washington University, Suite 630, One Dupont Circle, Washington D.C.

3. H. Morgan & K. Thomas (1996) 'A psychodynamic perspective on group processes' In M. Wetherall Identity, Groups and Social Issues. London: Sage Publications. Book 3 of D317 Social Psychology: Personal lives, social worlds. Milton Keynes: The Open University.

4. A. Obholzer & V. Z. Roberts (Eds) (1994) The Unconscious at Work. Individual and organizational stress in the human services. London: Routledge.

5. I. Menzies Lyth (1989) The Dynamics of the Social. Selected essays. London: Free Association Books.

6. At that time also influenced by W. R. Bion (1961) Experiences in Groups. London: Routledge.

7. Robin Goodfellow & Agnes Kukulska-Hume (1996) 'Evaluating new technology in learning and teaching: A summary of recent research at I.E.T.' Hypertext version at http://www-iet.open.ac.uk/iet/

8. J. & N. Symington (1996) The Clinical Thinking of Wilfred Bion. London: Routledge summarize more recent work of Bion which places more emphasis on understanding mental development than on pathological processes.

9. The most detailed case study is in my paper (1984) 'Geologists "map" course production'. Journal of Geography in Higher Education. 7:2 201 - 203.

10. Dr. W. Gordon Lawrence provided supervison and later I found peer support through my nine year membership in the Tavistock 'Consulting to institutions workshop' (1984-94), interruped for a year by my consultancy with two NHS (National Health Service) teams in mental health and mental handicap.

11. Details are in my paper (1985) 'Externalized anxieties in summer schools and what they reflect about institutional integration'. The Sociological Review. 30:1 91-105

12. My OU course contribution is (1992) 'Psycho-analytic perspectives' Learning and Teaching Mathematics. EM 236 Unit 12. Milton Keynes: The Open University. A condensed verison is (1993) 'Transformations' For the Learning of Mathematics. 13:1 24-27.

13. The University of Westminster, Centre for Community Care and Primary Health.

14. For example, P. Jeffcutt (1996) 'Between managers and the managed: The process of organizational transition' In S. Linstead (Ed al) Understanding Management. London: Sage Publications

15. A workshop organized by senior managers 'Making better mistakes. Banishing the blame culture from the OU' was held in June 1995 and the internal report states "fear and anticipation can stifle innovation and lead to apathy and, particularly, high levels of stress. Therefore it is vital to encourage a positive approach to mistake and deal with them by objective analysis rather than blame". The systems approach is long established in OU technology courses. One of the workshop organizers (Peters) offers some case studies in J. Fortune & G. Peters (1995) Learning from Failure: The systems approach. Chichester: Wiley. Although a systems approach may seem far removed from a psychodynamic one, linking them has been a focus at TIHR since the 1950's. See

E. Miller (1993) From Dependency to Autonomy. Studies in organization and change. London: Free Association Books and R. D. Stacey (1996) Strategic Management & Organizational Dynamics. 2nd edition. London: Pitman Publishing.

16. S. E. Jackson & M. N. Ruderman (Eds) (1996) Diversity in Work Teams. Research paradigms for a changing workplace. Washington D.C.: Americian Psychological Association.

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Appendix. Ten (numbered) consultancies out of twenty three 1981 - 93

1. Consultancy to a course team. S236 Geology (81)
2. Work counselling with a course team chair (81)
   Report on course team failure in technology (82)
   Participant-observer in the 'meaning studies' seminar (82)
   Report on group dynamics in the Science Faculty conference (82)
3. Participant-observation with staff in summer schools (83)
   Consultancy to a course team. E801 Curriculum and teaching (83)
   Consultancy to a course team. S298 Genetics (83)
4. Taped interviews with learners in summer school (86)
   Report on group process in P334 Reading diploma & BBC (86)
   Work counselling with chair of T201 Materials in action (87)
5. Report on impact of new technology staff (87)
6. Workshop for staff on group dynamics (88)
   Report on human relations skills in courses (88)

7. Consultancy to Centre for Mathematics Education team (88)
   Support of researcher in a summer school (88)
   Consultancy to IET management committee (88)
   Report on videos. ME234 Using mathematical thinking (89)
8. Group dynamics in a video. EM236 Learning & teaching maths (89)
9. Work counselling. Three team members (89)
   Report on impact of group dynamics. K663 Roles and Relationships (91)
10. Consultancy to course team. E209 Child Development (92)
    Participant-observer. P922 Handling stress course (93)

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The **Teaching and Consultancy Centre** is part of the Open University's Institute of Educational Technology.

Its aims are:

1. **To help improve student learning** in the University by advising and assisting Faculties, Schools, Continuing Education, University Committees and groups, as appropriate. A chief concern is the accessibility and teaching effectiveness of course materials, to which the Centre contributes through its work on course teams: through research; course planning, policy making and working methods; critical reading of draft materials, and the evaluation of courses.

2. **To maintain a knowledge base** for the above activities by helping to research problems in the OU learning system and by recording experience in course teams and on committees, and also to encourage innovatory solutions and practices.

3. **To provide consultancy and training,** inside the OU and on a contract basis with outside organisations, based on the staff's wide experience in distance education and open learning. On this same basis, to chair course teams and write course materials, and to 'transform' materials produced by external contributors into high quality distance teaching material.